

Surviving the First Six Months

Especially in the early stages of implementation, the transition to electronic records can be challenging. Preparing for the adjustment period is essential to surviving the first six months of EHR adoption.

Create implementation goals

The most successful implementations set a goal for when paper will be removed from the workflow. Most commonly, practices will choose a date, typically three months after go-live, or set a number of visits, typically two, before the paper charts get put away in onsite storage. Paper records are typically stored onsite for at least a year before moving to a secure storage facility, if necessary. Lab reports or other important documents that are not available electronically can still be scanned into the EHR as they come in. What works best will vary from office to office—but setting a date to go paperless helps keep the process on track.

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Prepare for slower productivity during the transition

The transition from paper to electronic records is not easy. It requires dedication and preparation. Expect that there will be challenges and that you and your staff will work slower than normal during the initial adjustment period. Because it can be stressful to maintain standard patient levels within the confines of a typical workday, providers should plan to either (1) decrease patient schedule or (2) simply work longer days to keep up with the needs of a full caseload while getting comfortable with the EHR.

Sample transition schedule:

Week 1: patient schedule at 50%
Weeks 2 & 3: patient schedule at 75%
Week 4: 75-100% at provider discretion
Week 5: functioning at 100% of schedule

Develop “super-users”

“Super-users” are in-house champions who have an intricate knowledge of most aspects of the EHR system. Their expertise allows them to successfully train and support the rest of the staff. They will work through any barriers or kinks in the system first. Small settings may only have one super-user, but in a hospital or larger facility or hospital, a core group is ideal. The group should include the front desk, nursing, and clinical staff. It is imperative that super-users be accessible to support the rest of the staff and field questions after implementation.

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Take the time to push every button

Realizing all the benefits of your EHR takes personal time and commitment. There are efficiencies in the system that many physicians may never recognize or learn. Each shortcut saves a few clicks or steps that can allow you to get your work accomplished more efficiently. Vendors don't know your group nearly as well as you do, so invest the time yourself to customize the system to your needs.

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Maintain a positive atmosphere

Understand that staff will have a range of feelings about adopting an EHR, from excited and willing to petrified. While setting deadlines and having a physician champion will help keep everyone on board, it is important to make time for celebrations, starting from the very beginning of the process. Welcoming all staff to evaluate vendors during the selection process or including food at various training opportunities can be useful strategies.

Once your EHR has been implemented, maintain an open, positive environment with hosted lunches to discuss the implementation, office-wide emails with important updates and tips, and updates to the team if there is a change in strategy or vision. Another important way to keep things positive is to define clear lines of communications regarding who to contact for questions and immediate needs. These steps will minimize negativity and increase your team's commitment.

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Utilize your vendor for support

Make sure you can access the services in your contract. Publish who to contact, the best way to contact them, and what hours they are available. Make sure everyone in the office understands the workflow. Most vendors also offer monthly user groups and online user forums. These are great ways to hear from other providers about what functions they use and what shortcuts and solutions they have found for common problems.

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